November 9, 2004

REQUEST FOR PROPOSAL
For Developing A System of Pedestrian Districts for the Bay Area

Dear Consultant:

The Metropolitan Transportation Commission ("MTC") invites your firm to submit a proposal to assist with the Development of a System of Pedestrian Districts for the Bay Area.

This letter, together with its enclosures, comprises the Request for Proposal (RFP) for this project. Responses to the RFP should be submitted according to the instructions outlined herein.

Proposal Due Date

Interested firms must submit one original and three (3) hard copies of their proposals no later than **3:00 p.m., December 20, 2004.** Proposals received after that date and time will not be considered.

Proposals will be considered firm offers to enter into a contract and perform the work described in this RFP for a period of ninety (90) days from their submission.

MTC Point of Contact

Proposals and all inquiries relating to this RFP shall be submitted to the Project Manager at the address shown below. For telephone inquiries, call (510) 464-7759. E-mail inquiries may be directed to Nokasaki@mtc.ca.gov.

Nancy W. Okasaki, Project Manager
Metropolitan Transportation Commission
Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, California 94607-4700
Fax: (510) 464-7848

Background
MTC is the regional transportation planning agency for the nine-county San Francisco Bay Area. In 2001, MTC established a Regional Pedestrian Committee (RPC) to begin to address pedestrian-related issues and determine what can be done at a regional level to assist local jurisdictions in future planning efforts. MTC and the RPC would like to explore the use of pedestrian districts as a concept for defining a Bay Area pedestrian "system" and identifying pedestrian facility improvements to serve non-recreational pedestrian travel. The study would begin with a brief review of pedestrian planning and the use of pedestrian districts among local agencies. A typology of pedestrian districts will be developed to establish criteria that could be used to define a system of pedestrian districts. The subsequent focus of the study will be on pedestrian districts around transit, and the study will take a first step toward identifying planned pedestrian improvements and associated funding needs in transit-oriented pedestrian districts.

A separate, but related element to the project calls for the consultant to update the MTC Regional Pedestrian Resource Guide and to recommend a maintenance program to keep the Guide current.

For additional background information on the project, see Section I.A of the RFP.

Pre-Proposal Conference

A pre-proposal conference will be held on November 22, 2004 @ 9:00 a.m. Any addenda to the RFP will be posted on the MTC web site (www.mtc.ca.gov) and sent to pre-proposal conference attendees and those firms who have submitted a written request for addenda to the project manager.

Scope of Work, Schedule and Budget
A preliminary scope of work is set out in *Appendix A*, Scope of Work, which describes the specific tasks and deliverables under this RFP.

We expect the work to be completed in approximately nine months from the time that a contract is executed, in general accordance with the proposed schedule at the end of *Appendix A*.

The maximum amount available for this project is $75,000. Given the limited funds, the consultant is asked to identify the level of effort they will expend on each element of the workscope.

Proposal Evaluation
Proposals will be evaluated in accordance with the evaluation factors listed in Section IV of the RFP.

MTC reserves the right to accept or reject any or all proposals submitted, waive minor irregularities in proposals, request additional information or revisions to offers, and to negotiate with any or all proposers. Any contract award will be to the firm that presents the proposal that, in the opinion of MTC, is the most advantageous to MTC, based on the evaluation criteria in Section IV.

Consultant Selection Timetable

November 22, 2004, 9:00 am – 11:00 am	Pre-proposal conference
December 20, 2004, 3:00 pm	**Closing time/date for receipt of proposals**
Week of January 3, 2005	Interviews (if required)
January 12, 2005 (approximate)	Execution of contract

General Conditions

All materials submitted by proposers are subject to public inspection under the California Public Records Act (Government Code § 6250 *et seq*.), unless exempt.

A synopsis of MTC contract provisions is enclosed for your reference as *Appendix D*. Please note that, if selected, the consultant will be required to obtain and maintain at its own expense the insurance coverages specified in *Appendix D* for the duration of this agreement. Any objections to the insurance requirements must be brought to MTC's attention in accordance with the selection dispute procedures in Section V.E of the RFP, i.e. no later that one-week prior to the due date for proposals.

Authority to Commit MTC

The Executive Director of MTC will select a consultant and will commit MTC to the expenditure of funds in connection with this RFP, taking into consideration the recommendation of the evaluation panel.

Thank you for your participation.

Sincerely,

Ann Flemer
Deputy Director, Operations

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REQUEST FOR PROPOSALS

to the

METROPOLITAN TRANSPORTATION COMMISSION

for

System of Pedestrian Districts

November 9, 2004

Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700

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I. BACKGROUND & PROJECT DESCRIPTION

A. Background

The Metropolitan Transportation Commission (MTC) was created by the state Legislature in 1970 to provide transportation planning for the nine-county San Francisco Bay Area. MTC functions as both the regional transportation planning agency (RTPA) – a state designation – and for federal purposes, as the region's metropolitan planning organization (MPO).

MTC is the regional transportation planning agency for the nine-county San Francisco Bay Area. In 2001, MTC established a Regional Pedestrian Committee (RPC) to begin to address pedestrian-related issues and determine what can be done at a regional level to assist local jurisdictions in future planning efforts. In addition, the Commission recently established a new regional funding program for bicycle and pedestrian capital projects and has committed to this program through the long-run in Transportation 2030, the regional long range transportation plan. One purpose for this project is to encourage local agencies to begin to develop, quantify, and prioritize needed pedestrian facility improvements in their jurisdictions.

MTC and the RPC would like to explore the use of pedestrian districts as a concept for defining a Bay Area pedestrian "system" and identifying pedestrian facility improvements to serve non-recreational pedestrian travel. It has been recognized that high levels of pedestrian activities exist in and around major transit facilities such as train stations, bus hubs, and intermodal transfer facilities. In focusing on transit-oriented pedestrian districts, this study will build on MTC's Transit Oriented Development (TOD) Study, which is currently underway. The TOD study is assessing the opportunities, benefits and barriers for increased levels of TOD in the San Francisco Bay Area, and defining MTC's policies in support of Bay Area TODs. The TOD Study will recommend policies for conditioning regional discretionary funds under MTC's control for Resolution 3434 transit expansion projects and will further help define and implement these policies.

B. Project Description

The MTC is working with the Bay Area Regional Pedestrian Committee to conduct research and planning to support future Regional Transportation Plan (RTP) updates and the pedestrian element of the Regional Bicycle and Pedestrian Funding Program. Consultant assistance is being sought to define a system of pedestrian districts in the Bay Area and begin to estimate the need for pedestrian improvements serving pedestrian trips.

The proposed study will begin with a brief review of pedestrian planning and the use of pedestrian districts among local agencies. A typology of pedestrian districts will be developed to establish criteria that could be used to define a system of pedestrian districts. The subsequent focus of the study will be on pedestrian districts around transit, and the study will take a first step toward identifying planned pedestrian improvements and associated funding needs in transit-oriented pedestrian districts.

Using information from the pedestrian district typology, criteria suggested by the consultant and the TODs identified in the MTC TOD study referred to in I.A above, MTC staff will conduct analyses using a Graphical Interface System (GIS) to identify up to 10 pedestrian districts for mini case studies to be conducted by the consultant. Through the mini case studies, it is anticipated that the project will identify factors and features that make pedestrian districts pedestrian-friendly and supportive of transit. In addition, the case studies should identify those facilities that best provide safety and accessibility and have the highest impact on improving the pedestrian environment. Finally, the case studies should recommend next steps for expanding this work to other types of pedestrian districts as a way to encourage local pedestrian planning.

A separate, but related element to the project calls for the consultant to update the MTC Regional Pedestrian Resource Guide and to recommend a maintenance program to keep the Guide current. The Guide was originally developed to serve as a central clearinghouse for pedestrian planning resources, including planning and engineering studies/reports, websites of organizations involved in pedestrian planning nationally and in the Bay Area, reference materials available in the MTC/ABAG Library, and annual events that promote pedestrianism. The Guide was intended to be a resource for planners, engineers, advocates, and people interested in improving the pedestrian environment for everyone.

II. SCOPE OF WORK, SCHEDULE AND BUDGET

The preliminary scope of work for the project is provided in Appendix A. The consultant will be expected to perform all work and analysis necessary to complete the workscope.

We expect the work covered by this contract to be completed by June 30, 2004.

MTC has budgeted $75,000.00 for this work.

III. FORM OF PROPOSAL

Proposers must submit an original and three (3) copies of their proposals, by **3:00 p.m. on December 20, 2004**, to be considered.

In furtherance of MTC’s resource conservation policy, proposers are asked to print proposals back to back and are encouraged to use recycled paper for all proposals and reports.

Proposal content and completeness are most important. Although no page limitation will be imposed, clarity is essential and will be considered in assessing the proposers' capabilities. Each proposal should include:

A. Transmittal Letter

A transmittal letter signed by an official authorized to solicit business and enter into contracts for the firm. The transmittal letter should include the name and telephone number of a contact person.

B. Title Page

The title page should show the RFP subject, the name of the proposer’s firm, local address, telephone number, name of contact person, and the date.

C. Table of Contents

The table of contents should include a clear identification of the material by section and page number.

D. Overview and Summary

This section should clearly convey the consultant's understanding of the nature of the work and the general approach to be taken. It should include, but not be limited to, the following:

1. a discussion of the purpose of the project;
2. a summary of proposed approach; and
3. the assumptions made in selecting the approach.

E. Detailed Work Plan

1. Discuss how the consultant will conduct each task of the project, identify deliverables, and propose a preliminary schedule. The discussion shall be in sufficient detail to demonstrate a clear understanding of the project. The schedule should show the expected sequence of tasks, subtasks, and important milestones. The selected consultant, in consultation with MTC staff, will develop a final work plan and schedule.
2. Provide a detailed staffing plan for each task of the work. Identify all staff by name and the specific tasks for which each individual will be responsible.
3. Describe approach to managing resources and maintaining quality results. Include a description of the role of any subcontractors, their specific responsibilities, and how their work will be supervised.

F. Qualifications and References

1. Provide one-page resumes for each staff person assigned to the project, summarizing the individual's training and experience relevant to this project. Include resumes for key subcontractor personnel, as well. Address individual expertise in familiarity with the necessary types of data collection, review, and storage/organization.

2. Provide a brief description (one page maximum) of any previous projects similar to the services requested, indicating the project title, duration, budget, sponsoring agency and sponsor project manager, and roles played by individuals proposed for this study. Please include the name of the contact person, agency for whom the work was performed, telephone number, and year that the work was done. References may be checked for one or more of the final candidates. Include projects that demonstrate expertise of key project staff in collection and analysis of data and familiarity with the Bay Area.

3. List any contracts with MTC entered into by the consultant or any of its subconsultants in the past three years, including a brief description of the scope of work, the contract amount, date of execution, and the agency.

4. Provide at least one sample of a written technical report or memo prepared by key members of the consultant team, identifying the authors. Only one copy is required, and the sample will be returned after proposal evaluation, upon request.

G. Budget

Provide a full description and breakdown of the expected expenditures of funds for each task contained in *Appendix A*, Scope of Work. The budget should include, but not be limited to, a task budget, a line item budget with billing rates, and data collection and analysis prices.

1. The task budget should present a breakdown of hours and expenses by task and deliverable for the project. It should identify or refer to key personnel or job descriptions in relation to each task to provide a full explanation of the resources committed to the project.

2. The line item budget should present a breakdown of costs by cost categories, including billing rates for key personnel and job classifications. The line item budget should be set forth on the Cost and Price Analysis Form attached hereto as *Appendix B* to this RFP. A line item budget should also be submitted for proposed sub-consultants with contracts estimated to exceed $25,000.

H. California Levine Act Statement

Submit a signed Levine Act statement (*Appendix C*).

IV. PROPOSAL EVALUATION

The Project Manager will conduct an initial review of the proposals for general responsiveness. Any proposal that does not include enough information to permit the evaluators to rate the proposal in any one of the evaluation criteria will be considered non-responsive. A proposal that fails to include one or more discrete items, or portions thereof, requested in Section III, Form of Proposal, may be considered responsive if evaluation in every category is possible.

Responsive proposals will be evaluated by a panel of MTC staff and representatives from partner transportation agencies, based on the following criteria, listed in order of relative importance:

- Expertise of firm and key staff in areas directly relevant to the project, including pedestrian planning studies, knowledge of pedestrian planning efforts in the Bay Area and nationally.
- Cost effectiveness.
- Approach to conducting and completing the project, including but not limited to: understanding of the purpose and requirements of the project; proposed work plan and schedule; strategy for managing resources, including subcontractors' personnel and project output; and approach to communicating with the MTC project manager.
- Resource allocation (personnel and expenditures) to key tasks, including the hours and appropriateness of personnel assigned to each task.
- Demonstrated written and oral communication ability. (Oral communcation will be evaluated only for short-listed firms, if interviews are held.)

Following this evaluation, short-listed proposers may be interviewed. References may be checked for one or more of the short-listed proposers prior to final evaluation. The Project Manager will then recommend a consultant to the Executive Director.

MTC reserves the right to select a consultant based solely on written proposals and not convene oral interviews. Further, MTC reserves the right to accept or reject any and all submitted proposals, to waive minor irregularities, and to request additional information from the proposers at any stage of the evaluation.

V. GENERAL CONDITIONS

A. Limitations

This RFP does not commit the MTC to award a contract or to pay any costs incurred in the preparation of a proposal in response to this RFP.

B. Award

Any award made will be to the consultant whose proposal is most advantageous to MTC based on the evaluation criteria outlined above.

C. Binding Offer

A signed proposal submitted to MTC in response to this RFP shall constitute a binding offer from consultant to contract with MTC according to the terms of the proposal for a period of ninety (90) days after its date of submission, which shall be the date proposals are due to MTC.

D. Contract Arrangements

The selected consultant will be expected to execute a contract similar to MTC's Standard Consultant Agreement, which is summarized in *Appendix D*, Synopsis of MTC's Standard Consulting Agreements. Particular attention should be paid to MTC's insurance and indemnification requirements. A copy of the standard agreement may be obtained from the Project Manager. **If a proposer wishes to propose a change to any provision in the standard agreement, including the insurance requirements, the proposed change must be submitted in accordance with the Selection Dispute procedures described below, no later than one week prior to the date proposals are due.** Otherwise, acceptance of the standard agreement's terms and conditions may be presumed by MTC.

The contract payment terms will be lump sum (firm fixed price) with payment made on the basis of receipt by MTC of satisfactory deliverables.

E. Selection Disputes

A proposer may object to a provision of the RFP on the grounds that it is arbitrary, biased, or unduly restrictive, or to the selection of a particular consultant on the grounds that MTC procedures, the provisions of the RFP or applicable provisions of federal, state or local law have been violated or inaccurately or inappropriately applied by submitting to the Project Manager a written explanation of the basis for the protest:

1) no later than one week prior to the date proposals are due, for objections to RFP provisions; or

2) within three working days after the date on which the proposer is notified that it was not selected for objections to consultant selection.

Except with regard to initial determinations of non-responsiveness, the evaluation record shall remain confidential until the MTC Executive Director authorizes award.

MTC will respond to the protest in writing, based on the recommendation of a staff review officer. Protests must clearly and specifically describe the basis for the protest in sufficient detail for the MTC review officer to recommend a resolution. Upon request, MTC may allow up to three (3) additional days in which to supplement the protest.

Authorization to award a contract to a particular Contractor shall be deemed conditional until the expiration of the protest period or, if a protest is filed, the issuance of a written response to the initial protest by MTC.

Should the Proposer wish to appeal the staff decision to the Executive Director, it may file a written appeal no later than three (3) working days after receipt of the written response to the initial protest. The Executive Director’s decision will be the final agency decision.

F. Public Records

This RFP and any material submitted by a proposer in response to this RFP are subject to public inspection under the California Public Records Act (Government Code § 6250 *et seq*.), unless exempt by law. Proposals will remain confidential until the MTC Administration Committee has authorized award.

APPENDIX A, SCOPE OF WORK

Objective: To define a system of pedestrian districts in the Bay Area and begin to estimate the need for pedestrian improvements serving non-recreational pedestrian trips (e.g., work, school, and shopping trips). The products of this effort will support future regional transportation plan (RTP) updates as well as the pedestrian element of the Regional Bicycle and Pedestrian Funding Program. It is hoped that this effort will encourage local agencies to begin to develop, quantify, and prioritize needed pedestrian facility improvements in their jurisdictions.

Overview

1. The study will begin with a brief review of the state of pedestrian planning in the Bay Area. Which jurisdictions are undertaking pedestrian planning and is the concept of pedestrian districts being used?
2. A typology of pedestrian districts will be created based on the developed environment and pedestrian attractors, establishing criteria to define each type of pedestrian district (e.g. urban or suburban transit-oriented pedestrian district, university or school-zone pedestrian district, CBD pedestrian district).
3. Because the budget for this effort is limited, much of the remainder of the study will focus on pedestrian districts around transit stations, specifically, pedestrian districts in areas identified in MTC’s Transit Oriented Development (TOD) Study. This could automatically exclude some suburban or rural areas, but can be a starting point for the limited funds. Future work could address other types of pedestrian districts. Case studies will be conducted for up to 10 pedestrian districts within designated TODs to identify planned projects and their costs as well as policies and other factors affecting the pedestrian environment.
4. Using information from the case studies, sketch level cost estimates will be developed for pedestrian improvements in the TODs.
5. The study will recommend next steps such as: how to expand this work to other types of pedestrian districts and how MTC can encourage local pedestrian planning.
6. Finally, this project will update the Pedestrian Resource Guide and make it more user-friendly.

Deliverables are assumed to include one draft and one final, unless otherwise noted. The final deliverable will be developed based on a single set of comments provided by the MTC project manager.

All deliverables will be developed with input from a project technical advisory committee (TAC) that will be composed of representatives from the Regional Pedestrian Committee and other interested individuals. The consultant will present work in progress and draft deliverables to regular meetings of the project TAC for the duration of the project. TAC meetings may occur as frequently as monthly, and the consultant should anticipate the regular TAC meetings in the project schedule. At the close of the study, the consultant will present a summary of study findings to the full Regional Pedestrian Committee.

Task 1 – Brief Review of Pedestrian Planning in the Bay Area

The consultant will research the state of pedestrian planning in the region. The focus will be on non-recreational pedestrian trips. The review will cover questions such as:

- Which cities have or are developing pedestrian master plans (PMPs), pedestrian circulation elements in their general plans, ADA transition plans, etc.?
- How do these various plans relate to each other and pedestrian planning?
- How are pedestrian districts already defined (if at all) in Bay Area planning efforts?

The consultant will then write a memorandum discussing the state of pedestrian planning in the region. At a minimum, the consultant should identify what jurisdictions have developed Pedestrian Master Plans (PMPs), Circulation Elements, ADA Transition Plans and determine if the concept of pedestrian districts is already defined in these plans; how the concept is used, and how it has been useful.

Deliverables 1: Memorandum summarizing state of pedestrian planning in region

Task 2 – Develop a Typology of Pedestrian Districts

The consultant will define several types of pedestrian districts based on the unique developed environments that exist in the Bay Area (urban developed downtown, urban neighborhood, suburban downtown center, suburban neighborhood development, rural community center) and types of pedestrian attractors (transit hub or bus corridor, business district, tourist sites, universities). The consultant will identify criteria that can be used to define the various types of pedestrian districts. The consultant will:

- Characterize the pedestrian environment for each type of pedestrian-district. Are certain types of facilities more appropriate for certain types of pedestrian-districts?
- Focus attention on pedestrian districts around transit. The typology for these “transit-oriented pedestrian districts” is expected to build on information developed for MTC’s Transit Oriented Development (TOD) Study. [A Fact Sheet describing the TOD Study is included as Appendix A-1 to the Scope of Work]. Additional consideration will be given to regional bus corridors, which may not be TODs but may nonetheless have significant transit-related pedestrian activity.

The consultant will then prepare a memorandum and schematic diagram indicating the various types of pedestrian districts. The description of each type of pedestrian district shall contain information such as:

- the surrounding built environment (train station, transit hub, intermodal facility, shopping center)
- major types of nearby pedestrian attractors (schools, shopping, transit, CBDs)
- types of pedestrian facilities at major intersections (marked crosswalks, signalization, countdown signals, ADA compliance)

- characteristics of vehicular traffic, including transit
- level of pedestrian activity (may be qualitative)
- based on the above, determine if it possible to categorize regional (or regionally significant) pedestrian districts

Deliverable 2: Memorandum describing types of pedestrian districts and schematic diagram.

Task 3 – Case Studies

A. The consultant will recommend criteria for selecting pedestrian districts from within the TODs identified in MTC's TOD study. Criteria may include: demographics, land uses, status of pedestrian planning initiatives (including TLC planning grants) identified in Element 1, and information from the typology developed in Element 2. MTC staff will conduct analyses using GIS to identify pedestrian districts meeting the criteria. The Consultant will review the analysis results and work with MTC to select up to 10 pedestrian districts for which case studies will be conducted. If possible, at least one case study will involve a pedestrian district located in a low income area where car ownership is also low.

B. The consultant will conduct case studies for each of the 10 identified pedestrian districts to identify planned projects and better understand the pedestrian planning efforts. The consultant will contact staff from the jurisdictions and review existing local plans, programs, CIPs and other sources (including TLC projects and TLC planning grants) to identify planned pedestrian improvements and their costs. Examples of questions to be answered through the case studies include:

- Are there pedestrian facilities unique to or especially critical for transit oriented pedestrian districts?
- What facilities work the best to provide safety and accessibility?
- What design standards and guidelines are in use?
- Does the jurisdiction use pedestrian or multi-modal level of service (LOS)?
- Based on the case studies and existing design guidelines (VTA, Contra Costa County, Caltrans, etc.), can we identify standard types of pedestrian facility improvements that make sense in different types of transit-oriented pedestrian districts?
- What low-cost facilities/policies have the highest impact on improving the pedestrian environment?
-

In the case studies, the consultant shall not be restricted to what is already built, but should also consider planned projects that did not get implemented to study what was proposed. Oftentimes, the innovative features would have provided a new "state of the art" concept, but had to be dropped for other reasons.

The consultant will then prepare a report that discusses findings from the case studies of transit-oriented pedestrian districts. The report should:

- discuss factors and features that make them pedestrian-friendly;

- determine those facilities that are unique to or critical for supporting the transit orientation; identify those facilities that best provide safety and accessibility;
- identify standard types of facility improvements that logically work in different types of transit-oriented pedestrian districts; and
- identify low-cost facilities/policies that have the highest impact on improving the pedestrian environment.

Deliverable 3: Report on findings from case studies

Task 4 – Estimate Costs

Using information gathered from the case studies, the consultant will develop sketch level planning cost estimates for pedestrian improvements in remaining transit-oriented pedestrian districts. The objective is to get an order of magnitude cost; it is not necessary to develop individual estimates or each pedestrian district. This would be based on gross assumptions about the types of facilities needed, approximate distances and unit costs. Costs should be presented as a range, from "bare-bones" to the "Cadillac" level of improvements. (The idea is that agencies could choose from various levels of "pedestrian friendliness" and strive for higher levels through planning, visioning or actual development and engineering.) MTC staff will provide GIS analysis to assist in this task.

The consultant will then prepare a report discussing findings and how information was analyzed in order to assemble cost information. The report should include a discussion of methodology used to develop sketch level planning cost estimates for pedestrian improvements (assumptions about facilities needed, approximate distances, unit costs). To the extent possible, the report should present costs as a range from minimum requirements to most desirable innovations.

Deliverable 4: Report discussing findings of cost analysis

Task 5 – Define Next Steps

The consultant will:

- Recommend procedures for MTC to maintain and expand information on planned improvements in transit oriented-pedestrian districts
- Recommend steps for MTC to expand the effort to other types of pedestrian districts identified in Element 1.
- Consider what regional pedestrian needs are not addressed through the pedestrian-district approach and discuss ways for MTC and local jurisdictions to address these.
- Recommend steps MTC can take to encourage local jurisdictions to continue pedestrian planning, building on the pedestrian districts.

Deliverable 5:
Memo that addresses the above bullets in priority order, if applicable.

<u>Task 6 – Update the Regional Pedestrian Resource Guide</u> (currently downloadable from the MTC website by searching under Library Publications (under "R" for Regional Pedestrian Resource Guide)

The consultant will re-organize the Regional Pedestrian Guide to make it user-friendly and easy to maintain. The following improvements are desirable:

- Update current links and add new links and resources:
    - Improve "links" to other online "toolkits".
    - Reference similar resource guides (VTA Pedestrian Technical Guidelines, Caltrans Pedestrian & Bicycle Facilities Technical Reference Report) with brief summary/annotation.
    - Identify example of model ordinances for pedestrian planning.
    - Identify what others are doing; include examples of Bay Area "success stories" (e.g., Marin County Safe Routes to Schools).
    - Links to TOD study maps and maps and resources developed for this pedestrian districts project.
- Recommend ways to make it more available to all audiences and ways to handle time-sensitive information
- Propose maintenance plan: Methodology/instructions for MTC staff to follow to keep the Guide current and useful.

Deliverable 6:
A: Updated Regional Pedestrian Resource Guide
B: Maintenance Plan

Appendix A-1, Bay Area Transit Oriented Development (TOD) Study Overview

Study Purpose
The Transit Oriented Development (TOD) Study will assess the opportunities, benefits and barriers for increased levels of TOD in the San Francisco Bay Area, and help define MTC's policies in support of Bay Area TODs. Specifically, this study will recommend policies for conditioning regional discretionary funds under MTC's control for Resolution 3434 transit expansion projects on the demonstration of supportive land use policies by local government around transit stations and along key transit corridors. This direction was adopted in principle as part of Resolution 3434 and reaffirmed in the Commission's approval of the draft five-point transportation-land use platform in December 2003. This study will play an instrumental role in defining and implementing this policy, and will be conducted in close partnership with ABAG, transit agencies, local governments and other interested stakeholders.

The individual TOD Study Zone station areas are identified by locating the most significant form of existing, planned or programmed transit for the area, then defining these locations by that form of transit. U.S. Census blocks were selected from areas that intersect the TOD Study Zones.

Summary of MTC/ABAG TOD Study Workscope
One task of the MTC/ABAG TOD Study workscope relates to existing population, households and employment characteristics within the TOD Study Zones defined for this study. ABAG has been asked to provide specific demographic attributes in support of this study. These include the following:

1. Total Population (Male/ Female)
2. Median Age (Male/Female/ Both Sexes)
3. Age by Category
4. Total Households
5. Average Household Size
6. Household Characteristics (persons per household)
7. Total Housing Units (including Vacant)
8. Households by tenure (Owner Occupied, Renter Occupied)
9. Total Employment
10. Employment Category (manufacturing, retail, wholesale etc.)
11. Income

Data describing the existing population and employment characteristics are obtained from the Census Bureaus SF-1 and Census Transportation Planning Package. Summaries are provided for the entire regional TOD Study Zone area, as well as discreet TOD Study Zones within the region. The individual TOD Study Zone station areas are identified by locating the most significant form of existing, planned or programmed transit for the area, then defining these locations by that form of transit. The individual TOD Study Zone corridors are defined by locating the primary central street that transit service utilizes through the corridor.

TOD Study Zone Definition and Selection Criteria

The TOD Study Zones are based upon the Geographic Information Systems (GIS) database of Smart Growth Planning station areas and corridors utilized in the Smart Growth Strategy Regional Livability Footprint Project. GIS buffers are used to identify subsets of this database for analysis of areas by transit mode (e.g., heavy rail, light rail, bus rapid transit corridors, and ferry terminals). In order to describe the demographics of the TOD Study Zones, U.S. Census blocks were selected from areas that intersect the TOD Study Zones. The following selection criteria are used:

Heavy Rail Stations/ Ferry Terminals

- ½ mile buffer area around designated stations or terminals, including both complete and partial census tracts, where at least 35 % of the tract falls within the zone.

Light Rail Stations/ Select Bus Areas and Bus Rapid Transit Corridors and Terminus Locations

- ¼ mile buffer area around designated stations or terminals, including both complete and partial census tracts, where at least 35 % of the tract falls within the zone.

Existing Demographic Characteristics

The TOD Study Zone existing demographics are primarily based upon the collection of census blocks selected using the criteria discussed above. While the population and housing characteristics describing these areas are reported at the block level, the employment and income characteristics are defined at the block group level. Therefore, it was necessary to develop a process in order to parse out the employment and income characteristics from the larger block group level to the TOD Study Zones. ABAG disaggregated the employment characteristics reported at the block group level into the TOD Zones using our existing land use database for 2000. To calculate zonal employment totals, we have assumed a constant average density within the TOD Zones for only those areas where acres of existing employment-generating land use were identified.

Average Density = Total Jobs in each block group by divided by gross acres of employment-generating land use

We then multiplied the average density by the total area of the TOD Study Zone to determine the employment estimate. The following categories of employment are identified:

Category 1- Agriculture and natural Resources
Category 2- Manufacturing/ Wholesale/ Transportation/ Utilities
Category 3- Retail
Category 4- Financial and Professional Services
Category 5- Heath/ Education/ Recreation
Category 6- Other

Summary of Current Land Uses

ABAG has been asked to provide a summary of the current land uses within the TOD Zones identified for this study. ABAG has used its Existing Land Use database for 2000 to describe the current land uses within the TOD Study Zones. A complete description of this database is included as an attachment.

ABAG has developed a personal geodatabase to store all relevant data for this project. Included in this database are the GIS layers describing the TOD Study Zones for the region, the existing land uses within each TOD Study Zone, as well as the demographic tables containing the population, household and employment characteristics, including information according to the mode of transit service (e.g., heavy rail, light rail, and rapid bus). ABAG is providing this information to the consultant in digital form. Please refer to the readme file contained on the CDROM for additional information describing the media provided with this submittal.

We are currently in the process of preparing hard copy maps for the entire region, as well as each individual TOD Study Zone. In addition, we are creating hard copy reports summarizing the demographic characteristics identified for each TOD Study Zone. ABAG will forward this information to MTC and the consultant once this is complete.

APPENDIX B, COST AND PRICE ANALYSIS FORM

COST AND PRICE ANALYSIS - RESEARCH AND DEVELOPMENT CONTRACTS				
			PURCHASE REQUEST NUMBER	
NAME AND ADDRESS OF OFFERER	TITLE OF PROJECT			
DETAIL DESCRIPTION		ESTIMATED HOURS	RATE/HOUR	TOTAL ESTIMATED COST (Dollars)
1. DIRECT LABOR(Specify)				
TOTAL DIRECT LABOR				
2. BURDEN (Overhead-specify) Dept. or Cost Center	Burden Rate	X BASE	BURDEN ($)	
TOTAL BURDEN				
3. DIRECT MATERIAL				
TOTAL MATERIAL				
4. SPECIAL TESTING (Including field work at Government installations)				
TOTAL SPECIAL TESTING				
5. SPECIAL EQUIPMENT (If direct charge - specify in Exhibit B on reverse				
6. TRAVEL (If direct charge)				
a. TRANSPORTATION				
b. PER DIEM OR SUBSISTENCE				
TOTAL TRAVEL				
7. CONSULTANTS (Identify - purpose - rate)				
TOTAL CONSULTANTS				
8. SUBCONTRACTORS (Specify in Exhibit A on reverse)				
9. OTHER DIRECT COSTS (Specify in Exhibit B on reverse - explain royalty costs, if any)				
10. TOTAL DIRECT COST AND BURDEN				
11. GENERAL AND ADMINISTRATIVE EXPENSE (Rate % of item nos.)				
12. TOTAL ESTIMATED COST				
13. FIXED FEE OR PROFIT (State basis for amount in proposal)				
14. TOTAL ESTIMATED COST AND FIXED FEE OR PROFIT				

15. OVERHEAD RATE AND GENERAL AND ADMINISTRATIVE RATE INFORMATION		
A. GOVERNMENT AUDIT PERFORMED	DATE OF AUDIT	ACCOUNTING PERIOD COVERED
B. NAME AND ADDRESS OF GOVERNMENT AGENCY MAKING AUDIT		C. DO YOUR CONTRACTS PROVIDE NEGOTIATED OVERHEAD RATES? ( ) NO ( ) YES (IF YES, NAME AGENCY NEGOTIATING RATES)

D. (If no Government rates have been established, furnish the following information)

DEPARTMENT OR COST CENTER	RATE	TOTAL INDIRECT EXPENSE POOL		BASE FOR TOTAL

16. EXHIBIT A - SUBCONTRACT COSTS (If more space needed, use blank sheets, identify item number)

NAME AND ADDRESS OF SUBCONTRACTOR(S)	SUBCONTRACTED WORK	SUBCONTRACT	
		TYPE	AMOUNT
	TOTAL		

17. EXHIBIT B - OTHER DIRECT COSTS (If more space needed, use blank sheets, identify item number)

TOTAL	

NO. OF CONTRACTOR EMPLOYEES: [ ] 500 AND UNDER [ ] OVER 500 [ ] OVER 750 [ ] OVER 1,000	STATE INCORPORATED IN:
DATE	SIGNATURE AND TITLE OF AUTHORIZED REPRESENTATIVE OF CONTRACTOR

APPENDIX C, CALIFORNIA LEVINE ACT STATEMENT

California Government Code § 84308, commonly referred to as the "Levine Act," precludes an officer of a local government agency from participating in the award of a contract if he or she receives any political contributions totaling more than $250 in the 12 months preceding the pendency of the contract award, and for three months following the final decision, from the person or company awarded the contract. This prohibition applies to contributions to the officer, or received by the officer on behalf of any other officer, or on behalf of any candidate for office or on behalf of any committee.

MTC's commissioners include:

Tom Ammiano	Scott Haggerty	Jon Rubin
Tom Azumbrado	Barbara Kaufman	Bijan Sartipi
James T. Beall, Jr.	Steve Kinsey	James P. Spering
Irma L. Anderson	Sue Lempert	Pamela Torliatt
Mark DeSaulnier	John McLemore	Sharon Wright
Bill Dodd	Michael D. Nevin	Shelia Young
Dorene M. Giacopini		

1. Have you or your company, or any agent on behalf of you or your company, made any political contributions of more than $250 to any MTC commissioner in the 12 months preceding the date of the issuance of this request for qualifications?

   ___ YES ___ NO
   If yes, please identify the commissioner: ____

2. Do you or your company, or any agency on behalf of you or your company, anticipate or plan to make any political contributions of more than $250 to any MTC commissioners in the three months following the award of the contract?

   ___ YES ___ NO
   If yes, please identify the commissioner: ____

Answering yes to either of the two questions above does not preclude MTC from awarding a contract to your firm. It does, however, preclude the identified commissioner(s) from participating in the contract award process for this contract.

____________________ DATE

____________________ (SIGNATURE OF AUTHORIZED OFFICIAL)

____________________ (TYPE OR WRITE APPROPRIATE NAME, TITLE)

____________________ (TYPE OR WRITE NAME OF COMPANY)

APPENDIX D, SYNOPSIS OF MTC's STANDARD LETTER AGREEMENT

1. Independent Contractor: CONSULTANT is an independent contractor and has no authority to contract or enter into any other agreement in the name of MTC. CONSULTANT shall be fully responsible for all matters relating to payment of its employees including compliance with taxes.

2. Indemnification: CONSULTANT agrees to defend, indemnify and hold MTC harmless from all claims, damages, liability, and expenses resulting from any negligent or wrongful act or omission of CONSULTANT in connection with the agreement. CONSULTANT agrees to defend any and all claims, lawsuits or other legal proceedings brought against MTC arising out of such act or omission. CONSULTANT shall pay the full cost of the defense and any resulting judgments.

3. Insurance Requirement: You agree to obtain and maintain at your own expense the following types of insurance placed with insurers with a Best's rating of A-X or better, for the duration of this agreement: (1) Worker's Compensation Insurance, as required by the law, and Employer's Liability Insurance in an amount no less than $1,000,000; (2) Commercial General Liability Insurance with a combined single limit of not less than $1,000,000 for injury to any one person and for any one occurrence and $2,000,000 general aggregate; and (3) Owned, Non-Owned, and Hired Automobile Liability Insurance in an amount no less than $1,000,000. The Commercial General Liability Insurance policy shall contain an endorsement to include MTC, its Commissioners, officers, representatives, agents and employees as additional insureds and to specify that such insurance is primary and that no MTC insurance will be called on to contribute to a loss. Certificates of insurance verifying the coverages and the required endorsements and signed by an authorized representative of the insurer must be delivered to MTC prior to issuance of any payment under the Agreement by MTC.

4. Termination: MTC may terminate the Agreement with five (5) days' prior written notice. If MTC terminates without cause, MTC will reimburse CONSULTANT for its non-recoverable project costs up to the date of termination. If CONSULTANT fails to perform as specified in the agreement, MTC may terminate the agreement for default by written notice; CONSULTANT is then entitled only to compensation for work performed in accordance with the Agreement.

5. Key Personnel: Substitution of key personnel, if named in the Agreement, requires advance MTC approval.

6. Data Furnished by MTC: All data, reports, surveys, studies, drawings, software (object or source code), electronic databases, and any other information, documents or materials ("MTC Data") made available to the Consultant by MTC for use by the Consultant in the performance of its services under this Agreement shall remain the property of MTC and shall be returned to MTC at the completion or termination of this Agreement. No license to such MTC Data, outside of the Scope of Work of the Project, is conferred or implied by the Consultant's use or possession of such MTC Data. Any updates, revisions, additions or enhancements to such MTC Data made by the Consultant in the context of the Project shall be the property of MTC.

7. Ownership of Work Product: All data, reports, surveys, studies, drawings, software (object or source code), electronic databases, and any other information, documents or materials

("Work Product") written or produced by the Consultant under this Agreement and provided to MTC as a deliverable shall be the property of MTC. Consultant will be required to assign all rights in copyright to such Work Product to MTC.

8. Subcontracts: No assignment or subcontracting of any part of the Agreement is permitted without prior written approval of MTC, and any attempt to do so will be null and void. MTC is under no obligation to any subcontractors.

9. Consultant's Records: CONSULTANT shall keep complete and accurate books, records, accounts and any and all work products, materials, and other data relevant to its performance under this Agreement. All such records shall be available to MTC for inspection and auditing purposes. The records shall be retained by CONSULTANT for a period of not less than four (4) years following the fiscal year of the last expenditure under this Agreement.

10. Prohibited Interest: No member, officer or employee of MTC can have any interest in this agreement or its proceeds and CONSULTANT may not have any interest which conflicts with its performance under this Agreement.